Portfolio Management

Advanced and Executive Portfolio Programme

Course Strapline

Translate strategy into disciplined investment choices, balanced capacity, dynamic priorities and evidence-based executive decisions.

Course at a Glance

Course Duration	Five days / 25 instructional hours	**Delivery Modes**	Classroom | Live Virtual | On-Demand | Blended | In-company
Level	Advanced / Executive	**Digital Materials**	Portfolio decision simulation, executive governance laboratory, digital case, templates and practical outputs
Certificate	INDENTRA course-completion record, where applicable	**Professional Recognition**	PMI Talent Triangle® - 25 PDUs

PMI Talent Triangle® and Professional Development Units (PDUs)

Total PDUs: 25	Ways of Working: 9	Power Skills: 5	Business Acumen: 11

Course Overview

Portfolio Management develops the capability to select, balance, govern and continually adapt investments so that scarce resources remain aligned with strategy, value, risk and organisational capacity. Participants work through an evolving portfolio case that connects strategic alignment, prioritisation, investment evidence, benefit confidence, portfolio risk, capacity constraints, dependencies, data quality and executive decision-making. The programme treats the portfolio as a dynamic system of choices rather than a passive list of projects and programmes.

Learning Outcomes

By the end of this course, you will be able to:

- Distinguish portfolio management from project and programme management and translate strategy into portfolio objectives, investment themes and transparent decision principles.
- Design and challenge a proportionate prioritisation model that combines strategic alignment, value, risk, urgency, feasibility, benefit confidence and executive judgement.
- Assess funding, resource and capability constraints, map dependencies and sequencing, and balance investments across risk, time horizons, strategic themes, mandatory work and innovation.
- Use portfolio risk, scenarios, sensitivity to assumptions and changing capacity or value evidence to make dynamic start, accelerate, defer, combine, narrow or stop decisions.
- Design decision-useful dashboards, governance forums, review cadence, escalation routes and executive communication that support continuous portfolio learning and adaptation.

Benefits

Benefits to the Individual

- Build advanced capability in strategic alignment, investment selection, portfolio balance and dynamic reprioritisation.
- Strengthen judgement around value, benefit confidence, risk, capacity, dependencies and executive trade-offs.
- Develop practical portfolio dashboards, governance routines and decision outputs for immediate workplace application.

Benefits to the Organisation

- Improve the quality and transparency of enterprise investment choices and strategic alignment.
- Use scarce funding, resources and capability more effectively across competing initiatives.
- Strengthen portfolio governance, adaptability and the ability to stop or redirect investments when evidence changes.

Who Should Attend?

Designed for portfolio directors and managers, PMO and enterprise PMO leaders, strategy, transformation and investment professionals, programme directors, senior project sponsors, finance, benefits and performance professionals, and executives serving on portfolio and investment governance forums.

Prerequisites and Equipment

Meaningful experience of projects, programmes, PMOs, strategy or investment governance is recommended. Participants should understand basic business-case, risk, benefits and governance concepts. No specialist quantitative qualification is required. Corporate cohorts may use a current or representative organisational portfolio as the principal case. A laptop or spreadsheet application may support selected analysis exercises.

Learning Approach

The course uses one evolving portfolio decision simulation and executive governance laboratory. Participants translate strategy into investment criteria, assess proposals, resolve capacity and dependency constraints, stress-test the portfolio under changing assumptions, design dashboards and governance rhythms, and defend dynamic investment decisions to a simulated executive portfolio board. The emphasis is on transparent evidence, disciplined judgement and adaptation when conditions change.

Digital Learning Materials

Digital participant resources support classroom, virtual, blended and on-demand learning and may include:

- Digital workbook and reference material covering portfolio mandate, strategic alignment, investment appraisal, prioritisation, capacity, dependencies, portfolio risk, governance and executive decision-making.
- Templates and canvases for investment criteria, prioritisation, benefit confidence, capacity and constraint analysis, dependency mapping, portfolio balance, scenarios, dashboards and governance rhythm.
- Evolving portfolio case materials, investment proposals, resource and funding constraints, scenario updates and executive decision challenges used during facilitated or self-paced application.
- Knowledge checks and concise job aids reinforcing portfolio boundaries, selection logic, evidence quality, capacity, risk, governance, decision triggers and communication.
- Reusable portfolio outputs and a practical portfolio-improvement or workplace application plan.

Assessment, Certification and Professional Recognition

Course completion is demonstrated through active participation in strategy, prioritisation, capacity and executive-decision activities; completion of the principal prioritisation, balance, dashboard and governance outputs; contribution to the final portfolio-board challenge or equivalent on-demand assessment; and preparation of a practical portfolio-improvement plan. An INDENTRA course-completion record may be provided where applicable. For eligible PMI credential holders, the 25 Education PDUs are classified as 9 Ways of Working, 5 Power Skills and 11 Business Acumen. The course develops capabilities relevant to the PfMP® examination domains but is not a dedicated PfMP® examination-preparation course.

Course Outline

The course comprises five integrated modules and 25 instructional hours, typically delivered over five days or through an approved on-demand pathway. It follows a complete portfolio decision cycle from strategic intent and prioritisation through capacity, balance, portfolio risk, governance and dynamic executive decisions while preserving the stated learning outcomes.

Module 1 - Portfolio Purpose, Strategy and Decision Architecture

Establish why the portfolio exists and translate organisational strategy into explicit investment principles and decision rights.

- Portfolio management purpose, boundaries and executive decisions.
- Strategic objectives, investment themes and value drivers.
- Portfolio categories, mandatory work and discretionary investment.
- Decision rights, governance forums, accountability, portfolio mandate and decision principles.

Applied Activity - Portfolio Strategy Workshop

Participants translate organisational priorities into investment themes, selection criteria and decision principles, then test whether the proposed portfolio mandate provides sufficient direction for consistent executive choices.

Module 2 - Investment Appraisal and Prioritisation

Create transparent, evidence-based investment choices without reducing executive judgement to a mechanical score.

- Investment cases, evidence quality and decision assumptions.
- Strategic alignment, value, risk, urgency and feasibility.
- Benefit confidence, decision records and evidence bands.

- Weighted criteria, scoring limitations, executive judgement and prioritisation challenge.

Applied Activity - Investment Selection Laboratory

Teams assess competing proposals using transparent criteria and evidence bands, challenge weak assumptions and defend a ranked investment recommendation using structured executive judgement.

Module 3 - Capacity, Dependencies and Portfolio Balance

Balance ambition with the funding, capability and delivery capacity actually available to the organisation.

- Funding, resource and capability constraints.
- Capacity planning and resource-constrained prioritisation.
- Project and programme interactions, dependencies and sequencing.
- Portfolio balance across risk, horizon, theme and delivery type, including synergies and enabling initiatives.

Applied Activity - Capacity and Dependency Simulation

Participants resolve funding, capability, sequencing and shared-resource constraints across the portfolio, then revise priorities to create a more credible and balanced investment set.

Module 4 - Portfolio Risk, Scenarios and Dynamic Choices

Stress-test portfolio robustness and adapt priorities as assumptions, risks, capacity and strategic conditions change.

- Aggregate and systemic portfolio risk.
- Scenario comparison, uncertainty and sensitivity to assumptions.
- Capacity, value evidence and benefit-confidence changes.
- Start, accelerate, defer, combine, narrow and stop decisions, dynamic reprioritisation and decision triggers.

Applied Activity - Portfolio Scenario Challenge

Teams test how strategic shifts, risk events and weaker benefit evidence alter the preferred portfolio and make explicit reprioritisation recommendations with supporting decision triggers.

Module 5 - Dashboards, Governance Rhythm and Executive Communication

Create the information, review discipline and executive dialogue required to keep portfolio choices credible over time.

- Data quality and decision-useful portfolio information.
- Portfolio dashboards, confidence indicators and performance signals.
- Review cadence, escalation, decision preparation and communicating trade-offs.
- Executive portfolio-board decisions, learning, adaptation and portfolio maturity.

Applied Activity - Executive Portfolio Board Simulation

Participants present and defend start, continue, accelerate, defer, combine, narrow and stop recommendations to a simulated portfolio board, using transparent evidence, capacity constraints, risk and strategic rationale.

Tools, Frameworks and Practical Outputs

Participants progressively build and use a practical portfolio-management toolkit through the evolving case:

- Portfolio mandate, strategic investment themes and decision principles.
- Transparent prioritisation model, benefit-confidence view and investment decision record.
- Portfolio capacity and constraint view, dependency and sequencing map, balance and scenario assessment.
- Executive portfolio dashboard, governance rhythm, dynamic decision framework and practical portfolio-improvement plan.

Delivery Modes Available

Live Classroom | Live Virtual Classroom | On-Demand Learning | Blended Learning | Corporate / In-company. On-demand delivery provides a structured self-paced route using the same learning outcomes, digital portfolio case, investment challenges, knowledge checks and applied decision exercises. Classroom and virtual delivery use facilitated simulations and executive challenge, while corporate programmes may be tailored to the organisation's strategy, governance, investment process, capacity constraints and reporting environment.

Course Enquiries

Visit www.indentra.co.uk/portfolio-management for the latest course information, delivery availability and enquiry options.